



# Enter Requirement Package



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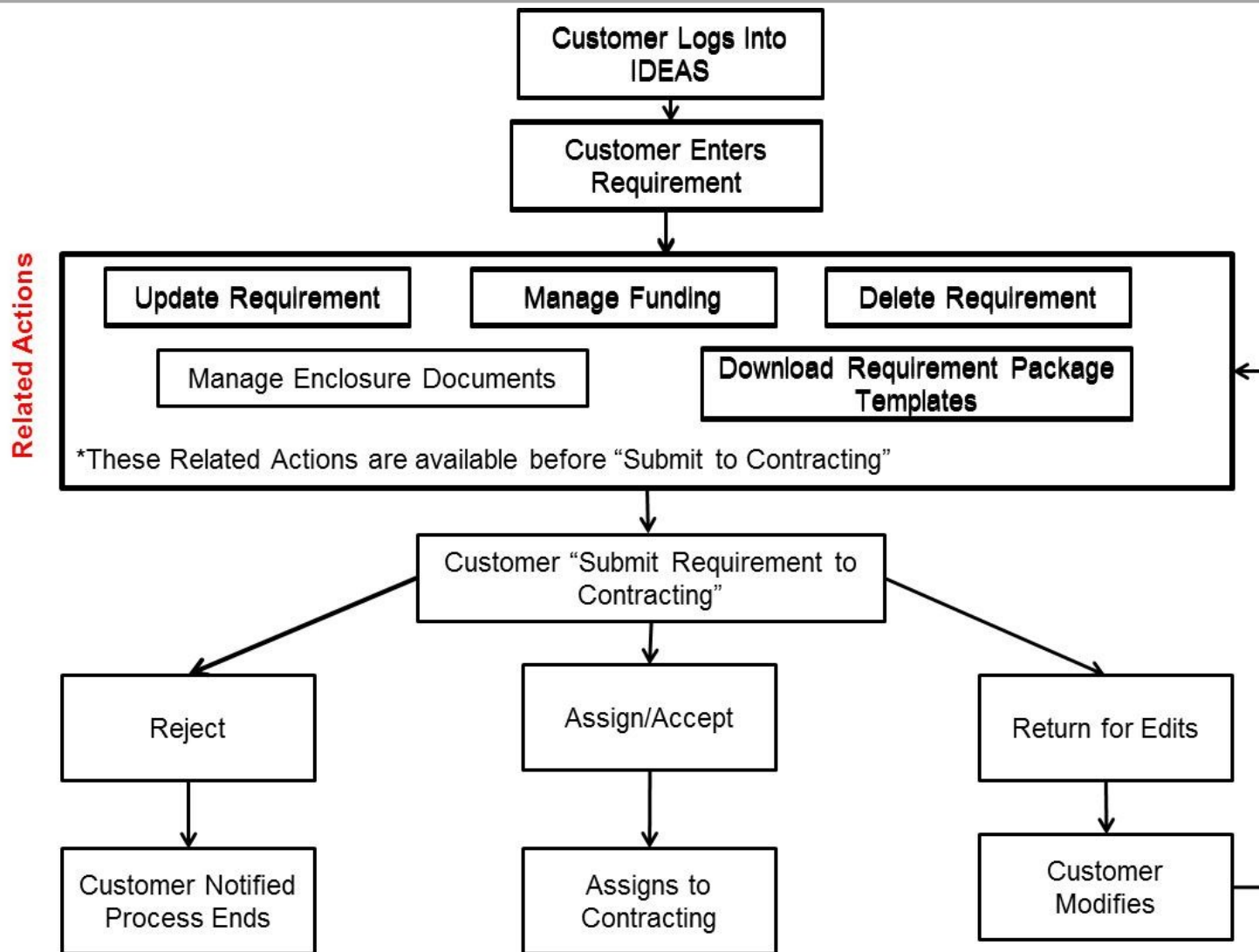
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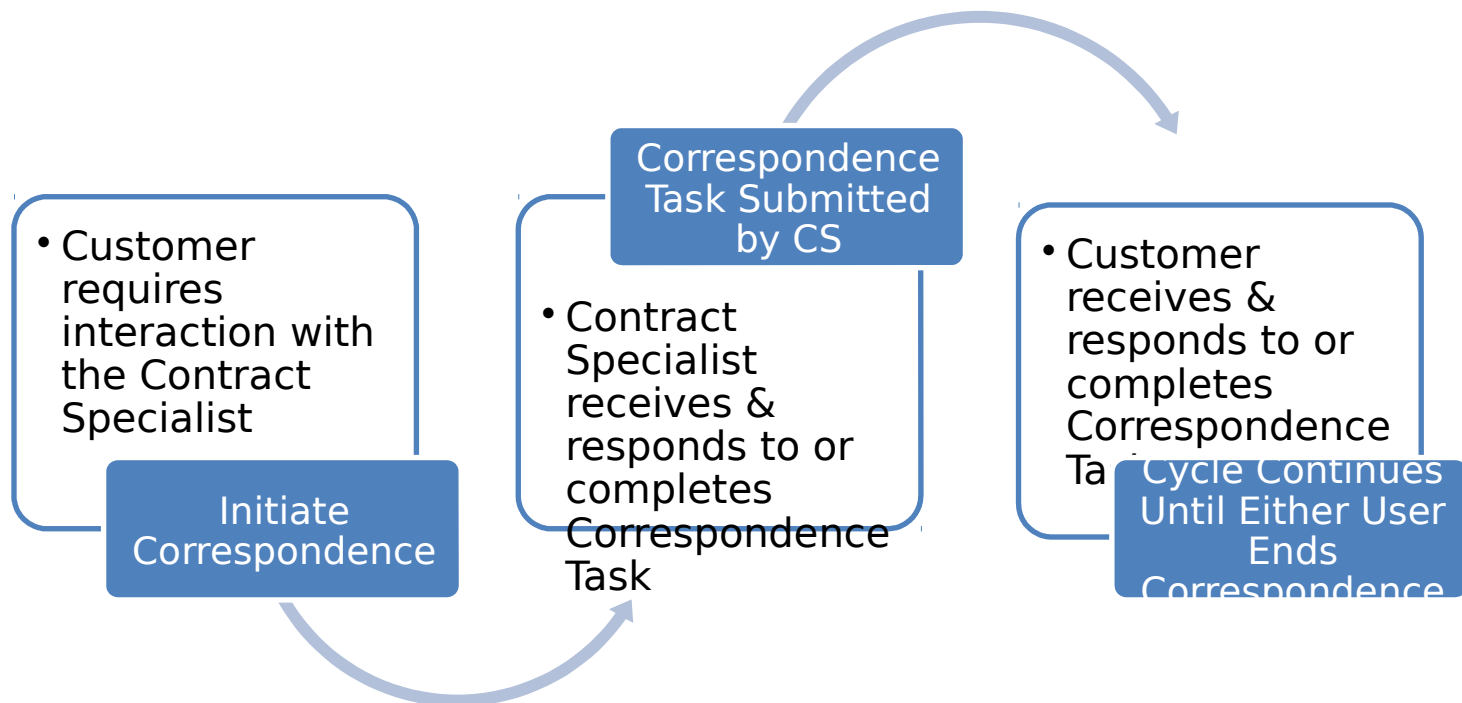
# Lesson Objectives

- **Objective:**
  - **Upon completion of this lesson the customer will be able to:**
    - Create a Requirement.
    - Review the *Requirement Summary Dashboard*.
    - Review the *Requirement Related Actions*.

# Requirement Process Overview



# Requirement Process: Post-Contracting Acceptance



\* Reverse process if the *Correspondence Related Action* is initiated by the Contract Specialist.



# New Requirement

- **Initiate *New Requirement* into IDEAS:**
  - **From the *Landing Page*, under “*Actions*”, click “*Enter New Requirement*”**

## Actions

[Enter New Requirement](#)

## My Tasks

Filters ▶

[Export](#)

[Refresh](#)

Task	Requirement #	Received	Assigned To
<a href="#">Respond to Correspondence from Indah Gass_CS for Requirement A000041</a>		9/28/2015 9:13 AM EDT	Indah Customer
<a href="#">Respond to Correspondence from Indah Customer for Requirement A000476</a>		6/4/2015 2:29 PM EDT	Indah Customer
<a href="#">Respond to Correspondence from Indah Gass_CS for Requirement A000333</a>		4/8/2015 3:03 PM EDT	Indah Customer
<a href="#">Update Correspondence for Requirement A000227</a>		4/1/2015 1:10 PM EDT	Indah_CS; Indah Customer

## My Requirements

Filters ▶

[Export](#)

[Clear Filters](#)

[Refresh](#)

Procurement Object	Identifier	Requirement Number	Status	Contract Specialist	Contracting Officer	Contracting Office	↓	Created Date
Requirement	<a href="#">A000065</a>	233333444	Validated					10/1/2015 6:07 PM EDT
Requirement	<a href="#">A000063</a>		Assigned/Accepted	Indah Gass_CS	Indah Gass_KO	PL511		10/1/2015 1:39 PM EDT
Requirement	<a href="#">A000060</a>	12344556	Assigned/Accepted	Chris BurgoyneCS	Chris BurgoyneKO	PL511		10/1/2015 11:09 AM EDT
Requirement	<a href="#">A000059</a>		Assigned/Accepted	Indah Gass_CS	Indah Gass_KO	PL511		9/30/2015 4:04 PM EDT
Requirement	<a href="#">A000054</a>	900001	Assigned/Accepted	Chris BurgoyneCS	Chris BurgoyneKO	PL511		9/29/2015 9:06 AM EDT
Requirement	<a href="#">A000050</a>	1234567	Assigned/Accepted	Chris BurgoyneCS	Chris BurgoyneKO	PL511		9/28/2015 1:12 PM EDT



# Enter Requirement Information

Fill out form.

A red asterisk (\*) denotes required fields.

It is important to fill in *all known information*.

Click **“Continue”** to go to the next portion of the form.

## Group Hierachy Selection

Agency / Organization / Sub Organization

Group Type \*

Organization

Please select an Group Type

Agency

-- Select One --

Please select an Agency

Organization \*

-- Select One --

Please select an Organization

Continue

Cancel



# Enter Requirement Information (cont.)

Fill out form.

A red asterisk (\*) denotes required fields.

It is important to fill in all known information.

Click **“Next”** to continue.

## Requirement Information

### Basic Information

Customer Requirement #

### Requirement Information & Key Dates

Title \*

Required Delivery Date \*

Priority \*

All dates must be entered in "MM/DD/YYYY" format

POP Begin \*

Category \*

All dates must be entered in "MM/DD/YYYY" format

POP End \*

All dates must be entered in "MM/DD/YYYY" format

Description \*

Summary Level of goods/services and if applicable contract and T.O. #

Next

Cancel





# Enter Requirement Information (cont.)

Fill out form.

A red asterisk (\*) denotes required fields.

It is important to fill in all known information.

Click **“Next”** to continue.

## Requirement Information

### Funding Information

Estimated Total Lifecycle Value \*

Estimated Base Period Amount \*

Estimated Current FY Amount \*

Award by Sept. 30th? \*

☐ Yes  
☐ No

### Requestor Information

Organization \*

Country \*

DoDAAC \*

Military/Federal Overseas

☐

POC Name \*

Chris BurgoyneCust

Address 1 \*

POC Email \*

BurgoyneCust@email.com

Address 2

POC Phone Number (+ext.) \*

City \*

State / Province \*

United States Zip Code \*

Zip Code Extension

Back

Next

Cancel



# Enter Requirement Information (cont.)

Fill out form.

A red asterisk (\*) denotes required fields.

It is important to fill in *all known information*.

Click **“Next”** to continue.

**Subject to Technical Expert Status Accreditation (TESA)? \***

☐ Yes- If yes, start to coordinate the TESA process and plan this lead time (approximately 8-18 weeks) into your acquisition planning.  
☐ No

[Show Guidelines](#)

**Involves Personally Identifiable Information (PII)? \***

☐ Yes  
☐ No

[Show Guidelines](#)

**Requires Property Accountability? (DISA customer requirements only) \***

☐ Yes- If yes, ensure the Electronic Product List (EPL) is made a part of the SOW/PWS (see Para 13f/14f of the SOW/PWS templates) or the Equipment/Material List (see “NOTE” in the excel spreadsheet).  
☐ No

[Show Guidelines](#)

**Recommended Product Service Code (PSC) \***

☐ Funding will be provided via DD Form 448 (MIPR)

[Show Guidelines](#)

**Incumbent Contractors**

Contractor	Contract Number	Task/Delivery Order Number
No items available		

[+ Add Incumbent Contractor](#)

[Show Guidelines](#)

**Recurring Requirement? \***

☐ Yes  
☐ No

[Show Guidelines](#)

**Involves Public Disclosure of Potentially Harmful Information? \***

☐ Yes  
☐ No

[Show Guidelines](#)

**Nomination to appoint a COR (Primary & Alternate) completed in the CORT Tool?**

☐ Yes  
☐ No

[Show Guidelines](#)

[Back](#)

[Next](#)

[Cancel](#)

# Enter Requirement Information (cont.)

Fill out form.

A red asterisk (\*) denotes required fields.

It is important to fill in all known information.

Click **“Save”** to finish then form.

## Requirement Information

### Primary Acceptor Information

Copy From Requestor

<b>Organization *</b> <input type="text"/>	<b>Country *</b> <input type="text" value="United States   USA"/>
<b>DoDAAC *</b> <input type="text"/>	<b>Military/Federal Overseas</b> <input type="checkbox"/>
<b>POC Name *</b> <input type="text"/>	<b>Address 1 *</b> <input type="text"/>
<b>POC Email *</b> <input type="text"/>	<b>Address 2</b> <input type="text"/>
<b>POC Phone Number (+text) *</b> <input type="text"/>	<b>City *</b> <input type="text"/>
	<b>State / Province *</b> <input type="text" value="-- Select One --"/>
	<b>United States Zip Code *</b> <input type="text"/>
	<b>Zip Code Extension</b> <input type="text"/>

<b>Alternate Acceptor Information</b>	
<b>Organization</b> <input type="text"/>	<b>Country</b> <input type="text" value="United States   USA"/>
<b>DoDAAC</b> <input type="text"/>	<b>Military/Federal Overseas</b> <input type="checkbox"/>
<b>POC Name</b> <input type="text"/>	<b>Address 1</b> <input type="text"/>
<b>POC Email</b> <input type="text"/>	<b>Address 2</b> <input type="text"/>
<b>POC Phone Number (+text)</b> <input type="text"/>	<b>City</b> <input type="text"/>
	<b>State / Province</b> <input type="text" value="-- Select One --"/>
	<b>United States Zip Code</b> <input type="text"/>
	<b>Zip Code Extension</b> <input type="text"/>

Back

Save

Cancel



# Requirement Confirmation and Navigation Links

- **Navigational Links:**
  - **Your New Requirement: XXXX**
    - This link takes you to the *Record Dashboard*.
  - **All Requirement Records**
    - This link takes you to ***all*** of your *Requirement Package Records*.

Click **“Your New Requirement: XXXX”** to go to the requirement’s *Summary Dashboard*.

## A000013 Has Been Created

You have successfully created your new requirement A000013 for kc delete soon. Use the navigation links below.

Related Actions are temporarily unavailable while creation processes complete. In the case that your Related Actions are not available, refresh the page.

### Navigation Links

[Your New Requirement: A000013](#)

[All Requirement Records](#)



# Review Summary Dashboard

UNCLASSIFIED

This is the *Summary Dashboard* where you can review the Requirement Package information for accuracy.

If updates are required, you can easily access the *Related Actions* menu or the three most-used *Related Actions* from the upper right-hand corner of the dashboard.



Summary •  
News  
Related Actions  
Additional Information  
Funding Information  
Enclosure Documents  
History

Records / Requirements

A000013 - KC Demo Reqt42

Follow

Update Requirement

Submit Requirement to ...

Delete Draft Requirement

## Basic Information

Status	Validated	Customer Requirement Number	No value was entered for the Customer Requirement Number. To enter a value, use the Related Action to update this requirement.
Contracting Office	-	PALT Contract Vehicle	
CS Assigned		Date Received	
KO Assigned		Required Delivery Date	
Priority	N/A	POP Begin	Sep 21, 2015
Category	IT Software	POP End	Sep 25, 2015
Description	A demo requirement		

## Funding Information

Total Funds Available for Obligation	\$0.00	Estimated Base Period Amount	\$10,000.00
Estimated Total Lifecycle Value	\$50,000.00	Award by Sept. 30th?	No
Estimated Current FY Amount	\$10,000.00		

## Requestor Information

Organization	My Org	Email	BurgoyneCust@email.com
DoDAAC	333333	Phone	2
POC Name	Chris BurgoyneCust	Address	4 Lexington, KY 33333

## Acceptor Information

Organization	da	Email	BurgoyneCust@email.com
DoDAAC	333333	Phone	2
POC Name	Chris BurgoyneCust	Address	4 3 main st, KY 33333

## Alternate Acceptor Information


Organization		Email	
DoDAAC		Phone	
POC Name		Address	

## Procurement Related Records



# Related Actions







- **Update Requirement:** Update the requirement information.
- **Manage Funding:** Add/Remove Funding Information.
- **Manage Enclosure Documents:** Upload/Add/Delete/Edit Enclosure Documents.
- **Submit Requirement to Contracting:** Submits to Contracting for review/approval.
- **Download Requirement Package Templates:** View ordering guidance and download requirement package templates.
- **Delete Requirement:** Removes requirement from system.



- Summary
- News
- Related Actions**
- Funding Information
- Enclosure Documents
- History

Records / Requirements

**A000234 - MH-009**

-  [Update Requirement](#)
-  [Manage Funding](#)
-  [Manage Enclosure Documents](#)
-  [Submit Requirement to Contracting](#)
-  [Download Requirement Package Templates](#)
-  [Delete Requirement](#)



# Summary

- **In this lesson you learned how to:**
  - **Create a Requirement.**
  - **Review the Requirement Summary Dashboard.**
  - **Review the Requirement's Related Actions.**



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